PGM Training Scenarios

1. Finding the Program (PGM) module
    a. Home Page Address: http://apps.era.nih.gov/pgm/
    b. http://impacii.nih.gov → click on "Web Applications" → click on Program Module (PGM)

Search Page

2. How do I quickly locate the status of a grant (e.g. when a PI calls with a question)?
    a. If not already in the default Search page, click on the Search menu tab
    b. When the search page displays, enter a combination or PI Name and/or Grant number and click search (using more search criteria speeds up searching).
    c. From the hitlist, click on the Grant Snapshot link.
    d. The 3rd row of the Snapshot, displays the IMPAC-II status.
    e. The rest of the Grant Snapshot displays other grant related information

Pending SRG Grants

3. Which competing grants in my portfolio are up for review?
    a. If not already there, click on the My Portfolio menu tab
    b. Click on the Pending SRG sub-menu tab
    c. The hitlist contains all competing applications that have an IMPAC-II status of Pending IRG Review.
    d. Sort on SRG meeting date
    e. If needed, scroll to the bottom of the page and click the Download button to export the list to Excel

4. How do I access the Agenda Report for a meeting
    a. From the Pending SRG sub-menu tab, click on the Agenda Report link on a selected grant.
    b. The Agenda Report for the meeting will open in a separate browser window

5. How do I access the Review Order Report for a meeting
    a. From the Pending SRG sub-menu tab, click on the "SRG Mtg Start" link on a selected grant.
    b. The Review Order Report for the meeting will open in a separate browser window

6. How do I find an SRA's contact info
    a. From the Pending SRG sub-menu tab, click on the "SRA Name" link on a selected grant.
    b. The SRA's contact info for the meeting will open in a separate browser window

Pre-Council Grants

7. Which competing grants in my portfolio are up for council?
    a. If not already there, click on the My Portfolio menu tab
    b. Click on the Pre-Council sub-menu tab
    c. The hitlist contains all competing applications that have an IMPAC-II status of Pending Council Review, No IRG Recommendation, and NRFC. This list defaults to the last, current, and next FYs ONLY.
    d. Sorting is available by percentile, priority score, and council meeting date, among other criteria.
    e. If desired, scroll to the bottom of the page and click the Download button to export the list to Excel

Post Council Grants

8. Which *competing grants* in my portfolio are Pending Award or "To be paid"?
    a. If not already there, click on the My Portfolio menu tab
    b. Click on the Post Council sub-menu tab
    c. The list contains all competing applications that have an IMPAC-II status of Pending Award, Council-not recommended for consideration, Council deferred, and "To be paid". <u>The list also contains awarded, but not yet active competing grants</u>. The list defaults to the last, current, and next FYs ONLY.
    d. Sorting is available by percentile, priority score, council meeting date, and "awarded but yet active grants", among other criteria.
    e. If needed, scroll to the bottom of the page and click the Download button to export the list to Excel

Pending Type 5 Grants

9. Which Type 5's in my portfolio need to be processed? Which *non-competing grants* in my portfolio are "To be paid"?
   a. If not already there, click on the My Portfolio menu tab
   b. Click on the Pending Type 5s sub-menu tab
   c. This list contains all *non-competing* grants that have an IMPAC-II status of "To Be Paid". <u>The list also contains awarded, but not yet active non-competing grants</u>. This list defaults to the last, current, and next FYs ONLY.
   d. Sorting is available by Type 5 Due date, Type 5 Receipt date, Budget Start Date and "awarded but yet active grants", among other criteria.
   e. If needed, scroll to the bottom of the page and click the Download button to export the list to Excel

10. How do I complete my Checklists (Green sheets) on Type 5 grants?
    a. Complete step 9.b
    b. In the Pending Type 5s hitlist, locate the PO Checklist column, and click on the Checklist link. If you accidentally click the Signed/Unsigned link, you can still access the Checklist from the resulting eRA Approvals page, by clicking the Program Checklist link in the middle of the page
    c. Complete the Checklist, by selecting the appropriate radio button for each question.
    d. After completing the answers, click the "Save and Return" button.

    NOTE: <u>do not</u> click the "Checklist Complete" button. While clicking "Checklist Complete" will successfully save your updates, a bug in the software will result in an erroneous message: "Checklist cannot be designated complete because all required items have not been answered". If you <u>do</u> click the ""Checklist Complete" button, simply ignore the message. It will not affect the saving of your data.

    e. Proceed to the PGM Approval page, to sign-off on the grant (see Scenario #11)

11. How do I process (approve/sign-off) on my Type 5 grants?
    a. Complete step 9.b
    b. In the Pending Type 5s hitlist, locate the PGM Approval column, and click on the "Unsigned" link. If you or someone else from your IC's Program staff has already approved the grant, the link will read "signed".
    c. Review the data in the Approvals page. If needed, complete the Checklist, by accessing them via the Program Checklist link in the middle of the page.
    d. If desired, you could add Sign-Notes, visible to GM staff, by clicking on the "Edit Note" link (see Scenario #12)
    e. To approve, click the Sign-off button. The signed-in users name will appear in the Signature area.
    f. Return to the Type 5's hitlist to continue processing grants.

12. How do I add Sign-Notes (Sign-Notes <u>are</u> visible to GM staff)
    a. Complete step 11.b
    b. Click the "Edit Note" link to the right of the PO Signature
    c. Add or edit Sign-Notes as desired
    d. Make sure you click the Save button to commit your changes to the database. IMPORTANT: if you do not click the Save button before you exit the Sign-Notes page, you will lose all your notes. Please save regularly.

Active Grants

13. How do I find all the Active grants in my portfolio?
    a. If not already there, click on the My Portfolio menu tab
    b. Click on the Active Grants sub-menu tab
    c. The hitlist contains all your active grants. For the eRA definition of an active grant see http://era.nih.gov/aboutera/glossary.cfm
    d. If needed, scroll to the bottom of the page and click the Download button to export the list to Excel

Features In Each Portfolio Page

14. How do I find dual a PO's contact info?
    a. From the hitlist, either on the Search page, or a Portfolio page, click on the Grant Snapshot link
    b. The Grant Snapshot will open in a separate window
    c. The MULTI IC/PCC section will have the Primary and Dual PO's contact info

15. How do I find the PI's contact info?
    a. From the hitlist, either on the Search page, or a Portfolio page, click on the Grant Snapshot link
    b. The Grant Snapshot will open in a separate window
    c. The PI AND INSTITUTION INFORMATION section will have the PI's contact info

16. How do I print PO and PI contact info only?
    a. On the Grant Snapshot find the ⊟ icon located on the right end of each blue shaded section header.
    b. Click the ⊟ icon to minimize any sections you do NOT wish to print
    c. Use the browsers Print feature (menu item File → Print) to print the Grant Snapshot. Only the expanded sections will be printed.

17. How do I view documents, such as Abstracts, Summary Statements, and e-Applications associated with a single grant?
    a. From the hitlist, either on the Search page, or a Portfolio page, click on the Grant#.
    b. The electronic Grant Folder will open in a separate window, and, if available electronically in IMPAC-II, contain the following documents:
        - Current Summary Statement
        - Prior Summary Statement(s)
        - Abstract
        - Notice(s) of Grant Award
        - Latest Notice of Grant Award
        - E-application (Grant Image or e-Snap)
        - Financial Status Report(s)
        - Latest Financial Status Report
        - Just in Time Document
        - PI History (Brief)
        - PI History (Detail)
        - Grant Snapshot Report
        - Progress Report Face Page
        - Fellowship Proposal Face Page
        - Transmittal Sheet
        - Abstract (Awarded Grant)
        - Population Tracking Grant Snapshot Report
        - Face Page – CGAP related grants
        - Budget Page - CGAP related grants
        - Checklist Page- CGAP related grants
        - Application Cover Letter - CGAP related grants

18. How do I add PO Notes (these notes are only visible to Program staff in your IC. They are not visible to Grants Management staff, or to Program staff in other ICs)
    a. From the hitlist on a Portfolio page, click on the PO Notes link
    b. The PO Notes page will open in a separate window
    c. Add or edit PO Notes as desired
    d. Make sure you click the Save button to commit your changes to the database. IMPORTANT: if you do not click the Save button before you exit the PO Notes page, you will lose all your notes. Please save regularly.

19. How do I view historical PO Notes (these notes are only visible to Program staff in your IC. They are not visible to Grants Management staff, or to Program staff in other ICs)
    a. Complete step 18.a
    b. Click the "Show Historical Notes" link
    c. All Historical PO Notes associated with the grant will be displayed

20. How do I search historical PO Notes (these notes are only visible to Program staff in your IC. They are not visible to Grants Management staff, or to Program staff in other ICs)
    a. Complete step 19.b
    b. Use the browsers Find feature (in Microsoft Internet Explorer & Netscape Navigator, menu item Edit → Find), to search for words or phrases.

21. What information can I find in the eRA Grant Snapshot?

a. The Grant Snapshot contains the following information:
   - Summary Project Information
   - Peer & Council Review Summary data
   - Administrative Codes (Human, Animal codes, etc)
   - Admin. IC Assignment
   - Multi IC/PCC Assignments
   - PI Information
   - Institution Information
   - Pre-award Budget
   - Award Details
   - Award Budget
   - Award Budget By CAN
   - CFY Line Items
   - SRG & Council Meeting Details

22. What information does the Attention flag give me?
    The Attention Flag is "flagged" if any of the following criteria is met –
    - The grant is a Foreign Grant, has a NIH-Defined Phase III Clinical Trial, is an Un-Awarded Type 5 Past The Start Date, is an Un-Received Type 5 Past The Due Date, is an AIDS Related Grant, and/or has Stem Cells Involved.

    Technical Definitions:
    - Un-awarded type 5 past the start date: Types 5 and 8 where the system date is greater than the budget start date and initial encumbrance date is null
    - Un-received type 5 past the due date: Types 5 and 8 where the system date is greater than the application due date and the application receipt date is null

23. How do I override the system-defined sort in a portfolio page and save the new sort?
    Each portfolio will permit you a different customizable sort. Since PGM has 6 portfolio pages & a search page, you have 7 custom sorts.
    a. From either the Search page or any of the My Portfolio pages, use the "Sort by" pick lists to select the desired nested sort and click the "Save as Default Sort" button
    b. When you access the page on subsequent occasions, the list will display with the new sort

24. How do I restore the system-defined sort in one of their portfolio pages?
    a. From either the Search page or any of the My Portfolio pages, click the "Restore Default Sort" button
    b. When you access the page on subsequent occasions, the list will display with the new sort

25. How do you include one or more grants assigned to another PO to your portfolio, for interest purposes?
    a. From the hitlist, either on the Search page, or a Portfolio page, click on the "Include Grants in my Portfolio" button
    b. The system will display the Search page
    c. Input search criteria and perform a search for the desired grant
    d. Grants that are eligible to be added will be displayed with a checkbox in the "Incl. Grant" column
    e. Check the grants you wish to add to your portfolio. **Important**: The "include" feature will only allow you to include grants not currently assigned to you as the PO, that are from the current, future, and two previous FY's. Anything outside of these criteria will not have the "include" checkbox enabled. Including grants in NOT the same as you or your IC being assigned to a grant. This feature is for tracking interest purposes ONLY.
    f. Click the "Include Grants in my Portfolio" button at the bottom of the Search page.
    g. The System checks if the grant already exists in one of the predefined portfolios, checks the "application status" of the grant, and depending on the status, adds it to the appropriate portfolio page.

26. How do I remove one or more non-assigned grants from their portfolio?
    NOTE: only grants manually included by the you may be removed.
    a. From a Portfolio page, click on the checkbox in the "Remove" column. The checkbox is enabled only on grants you manually included in your portfolio. You may not remove grants assigned to you. Pl. contact your DEA office if you wish to transfer/move a grant to another PO.
    b. Click the "Remove grant(s) from my portfolio" button at the bottom of the page

27. How do I find PGM user guides, help documents and get additional information about PGM?
    a. Go to URL http://impacii.nih.gov/applications/apps_pgm.cfm

28. How do I submit an enhancement request to PGM?
    a. Go to the bottom of any page in PGM
    b. Locate and click on the “Contact Us” link. A separate browser window will open with the eRA helpdesk contact info.

29. How do I link to other eRA modules, e.g., Commons, ECB, QVR, QuickView, etc?
    a. On each portfolio page, locate the Resources area at the top of the page.
    b. Click on the appropriate link, to access the desired module.

30. How do I access NIH and grant related resources
    a. Click on the Pre-Submission or General Resources menu tab
    b. Both pages provide access to an array of NIH and grant related resources

31. How do I view another PO’s portfolio?
    a. If not already there, click on the Other Portfolio menu tab
    b. Select the required PO’s IC & name, and click Search
    c. From the resulting hitlist, select the required PO by clicking the “View Portfolio” link
    d. The selected PO’s portfolio will be displayed by defaulting to the Pending Type 5’s page.

32. After viewing one PO’s portfolio, how do I view another PO’s portfolio? If a another PO’s portfolio is selected, clicking on the Other Portfolio menu item will take you to the previously selected PO’s portfolio
    a. Click on the sub-menu tab “Search Other PO”
    b. Continue with step 31.b

33. How do I compare my portfolio to another PO’s portfolio?
    a. In My Portfolio, select the portfolio page you wish to compare, by clicking on the appropriate sub-menu
    b. Complete step 31.d
    c. Select the other PO’s portfolio page you wish to compare, by clicking on the appropriate sub-menu
    d. Now, clicking on the My Portfolio and Other Portfolio main menu items will automatically default to the selected portfolio pages, providing a visual comparison of two portfolios at each stage of the grant life cycle.

Other PGM Scenarios

1. Why am I missing grants in my portfolio? Majority of helpdesk calls (~90%): "I’m missing grants in my portfolio". Reasons for missing grants:
    - Grant is assigned to another FY?
        - Use filters/search features to expand/limit grants on each portfolio page
    - Assigned to another PO?
        - Use PGM search & Snapshot to find PO assignment
    - Withdrawn?
        - Look in Other/Withdrawn page or search and find the IMPAC-II status of the grant
    - Extension system not in sync with eRA/IMPAC-II
        - eRA has no control over extension system and their synchronization schedules.
2. The Program Module “disappears”
    - PGM may disappear if you click on a link in another system (such as Outlook Mail). At this point, you could click the browsers back button and bring back PGM.
3. You get logged out after a period of inactivity
    - PGM logs users off after 3 hours of inactivity. Pl. make sure you save frequently!